Tableau Fundamentals: An Introduction to Connecting to Data

After you have chosen the greatest Tableau product with regard to you, its regarding time to begin obtaining insights in your own data! Similar to Tableau's suite of products, data connections are available in many shapes plus sizes. Right right now, Tableau Desktop: Individual has four several types of data connections, and even Tableau Desktop: Specialized adds another twenty four native ways to be able to hook up to info. This does certainly not even count to be able to access web info through custom-made fittings or ODBC links.

As you could imagine from typically the breadth of network options, you could hook up to practically any type regarding data in Tableau in case you rarely start to see the connection an individual are looking intended for, somebody is very likely working on a new custom-made solution that can help. We could publish a complete book about the several data links alone, nevertheless they most work similarly and even are fairly user-friendly. So to the uses of this publish, you will show an individual the way to get started using one connection variety and a several with the ways an individual can prepare to work alongside the data.

Connecting to Data in Tableau

Besides the more than 50 types of data connections mentioned in the introduction, every download of Cadre has a sample dataset called Sample : Superstore. When you open Tableau, you will see a screen that appears like this, where you have the option to choose your data link.

The options under the navigation going "To a File" can be utilized with Tableau Desktop computer: Personal. All possible data connections, including to data that resides on a server, can be accessed with Cadre Desktop: Professional.

In the bottom of the left routing, a few couple of data sources that come with every download of Cadre. The very first, Sample : Superstore, is actually an Excel document, so you can link to it if you are using Cadre Desktop: Personal or Tableau Desktop: Expert. We like to train with this data source since it is the most typical data source utilized in online tutorials and through Tableau's own training. To start using it, click it.

After simply clicking a saved databases, you are immediately thrown into the authoring interface. All of us discuss getting a lay of the land within post, but we actually want to take a step back again to exhibit you what happens when you

normally link to a new databases. To get to the data modifying interface, click "Data" in the top navigation, hover over the databases at the bottom of the dropdown, and click "Edit Information Source…".

This is the screen you may be presented with when connecting to an Excel or data source connection. In Cadre, the Excel workbook is treated as a database and the individual tab are treated as individual tables within that database. Because of this, you can sign up for tabs to one another if they have at least one field in common. To do so, simply drag the table (tab) that you want to participate into the data editing interface and tell Tableau what the two tab have in common. Here's what the Sample – Supermarket dataset appears like after we dragged the Returns table into the view and place up a remaining join on Purchase ID.

You can even do cross-database joins the information comes from different types of information contacts. To do this, you will click "Add" to the right of "Connections", link to your additional databases, and arranged up a sign up for just as imagined in the earlier image.

Should you be working with multiple tables that all have the same column headers, it may be preferable to partnership, or stack, the tables rather than becoming a member of them. Maybe you have got 12 months of web analytics data in one Stand out file, but each month's data survive a separate tabs. To union the twelve tabs, you would drag "New Union" from the left navigation on to the data modifying interface, then pull the tables that you would like to union in to the box that seems. When you create a union in Tableau, a line will be additional that informs you what sheet the information arrived from.

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